

## Service offering

FOR SWISS INDEPENDENT WEALTH MANAGERS



### Our core purpose

To take a stand for all investors, to treat them fairly and to give them the best chance for investment success

Vanguard was founded in the United States in 1975 on a simple but revolutionary idea: that an investment company should manage its funds solely in the interests of its clients. Instead of paying dividends to shareholders, our unique US ownership structure means we redirect our profits to investors in the form of lower fees. It's what we stand for: value to investors.

To investors we offer a range of plain, cost efficient and long-term oriented active and passive solutions, across traditional and sustainable investments. For independent wealth managers we offer a broad range of resources to help you define the appropriate asset allocation and portfolio construction to best achieve the investment goals of your clients.

### Investment research & education



- Macroeconomic research
- Model portfolios
- Thought leadership
- Behavioural finance
- ETF flows
- Newsletters

### Trade execution



- Guidance on ETF trading to help you achieve best execution:
  - Pre- and post-trade cost analysis
  - Guidance for limit orders
  - Information on liquidity providers
- Liquidity sourcing through 30+ market participants
- Market insights

### Product information



- Conference calls and meetings with portfolio managers and product specialists
- Product comparisons (performance, cost of ownership, replication type, domicile, liquidity, securities lending, etc.)
- Benchmark comparisons (performance, index methodology, allocation breakdowns, liquidity, etc.)
- Tailored fund reporting (due diligence questionnaires, product registration data, tax reports, etc.)

### Regional events



- Market outlooks
- Product updates
- Webinars

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### Important risk information

The value of investments, and the income from them, may fall or rise and investors may get back less than they invested.

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